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Universal Dynamics

Manager, Advisor, Home Plan Manage Deploy Evaluate Reward

Manager Advisor Home

Customer 02 - Director, Customer Operations

Our people are our company. The knowledge, skill and drive of our workforce are the key competitive advantages that enable the continued success of the company. Your job is to make sure that all your employees are focused on meeting goals that directly align to corporate objectives.

PLAN your organization:
Assessing your current organization [go >](#)

REWARD your employees:
Awarding a bonus [go >](#)

EVALUATE your organization:
Conducting a performance review [go >](#)

MANAGE your organization:
Driving performance improvement [go >](#)

DEPLOY your plan:
Onboarding an employee [go >](#)

QUICK HELP

Got the Performance Review Blues?
Click below for more info.
Conducting a performance review

Need help planning raises for next year?
Click below for more info.
Giving a salary increase.

DIRECT REPORTS

Customer 04
Customer 05

METRICS

Visibility-to-plan
Pipeline-to-plan
Deliverables-to-plan
Expenses-to-plan

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610 16 17

FIGURE 1

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting Powered by AUTHORIA

Awarding a bonus

Shelley Moore - Product Manager

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting Powered by AUTHORIA

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FIGURE 2

Universal Dynamics
 Home Address Plan Benefits Benefits Evaluate Reward Authorizes Publishing Administration Reporting
 All search Shelly Reiter - Product Manager

Understanding the compensation program

REPORTS **SEARCH** **REPORTS**

TABLE OF CONTENTS A9

- Company philosophy
- Policy snapshot
- Manager's role
- Legal considerations

3. Company philosophy

Elective compensation programs reward and encourage peak performance, enable the company to attract and retain top performers and reduce turnover. Universal Dynamics is committed to investing in employees and to achieving the highest return on that investment. Recognizing and rewarding top performers who consistently add value to the organization provides the culture and promotes a high-performance culture. Our compensation program is clearly aligned with the business strategy and reinforces the company's commitment to success.

3.1. Awards

- awarding a bonus
- conducting a performance review
- Driving performance improvement
- Giving a salary increase
- Granting stock options

3.2. Bonus policy

- Salary review policy
- Stock options policy

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3.3. Policy snapshot

Compensation is an important inter-employee tool to further the goals and vision of the company. The company has several compensation options available for managers to reward employees. When determining the best reward or combination of rewards for each employee, managers should consider the employee's

- performance
- role in the business
- role in the organization
- current compensation

Budgets

- The salary committee determines the budget for salary increases and bonus awards and is responsible for communicating the information to managers by October 31st.
- This year's increase is 5.0% of basic compensation, as of January 1st.
- Salary increases and bonus recommendations should not exceed the department budget.

Base salary

Base salary is compensation employees receive for performing their essential job functions. The company periodically evaluates base salary to be sure that it is in line with the marketplace and employees are being paid fairly. Managers must ensure that consistently high performance continues to move up in the salary range by receiving merit increases, typically on an annual basis.

Merit Increases

Merit increases are performance-based rewards, typically provided annually. They are not automatic or salary-based. When considering merit increases, managers must consider how each employee's performance compares to current base salary. Employees who consistently demonstrate high-quality performance should receive increases; few or poor performers should receive small or no increases.

Annual bonus

Bonuses are paid to employees based on achievement of specific goals. Like merit increases, annual bonuses are not guaranteed. Employees must meet target goals and expected to be eligible.

Bonuses

Bonuses provide an effective method for reinforcing a pay-for-performance culture. Since bonuses are designed to be motivational, employees should be provided quarterly updates regarding progress against established goals. Managers should ensure that their individual bonus pools are allocated appropriately to encourage, motivate and reward top performers.

Spot bonuses

In addition to annual bonuses which recognize the year's accomplishments, bonuses can be awarded "on-the-spot" when an employee accomplishes something unique or outstanding. Spot bonuses provide an effective means of providing immediate recognition to an employee who beyond and accomplished a task that adds material value to the organization. A spot bonus is generally a cash amount of \$500.00 or less. The presentation of the bonus should be personalized and the amount should reflect the level of achievement.

Professional Increases

Professional increases recognize significant increases in job responsibilities. The increase is determined by the job grade for the new position and the placement of the employee's salary in the new range. An employee can be promoted at any time during the year. When determining the increase amount, managers should consider:

- current base pay
- time frame of the last increase
- current salary for others in the same position

Stock options

The goal of the stock option program is to encourage retention by providing employees with an ownership stake in the company and a potentially significant return. A stock option award is appropriate for senior level employees who have a significant influence on business results. Managers should use stock options to motivate and retain these employees as key contributors to the company's success.

Gift certificates

Gift certificates provide a quick and easy way to instantly recognize and reward employees who exceed expectations or accomplish goals outside their normal job responsibilities. Rewarding this type of behavior encourages and motivates other employees to perform at a higher level. Gift certificates range from \$100.00 to \$300.00. Non-cash awards avoid the pricing or compensation and tax issues raised by the use of cash.

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3.4. Manager's role

It is your responsibility to

- know and understand the variety of compensation options available to reward, motivate and retain top performers
- be aware of the philosophy behind each option and its intended performance result
- support the company's pay-for-performance business strategy with prudent use of compensation options
- discourage poor performance by limiting salary increases and other rewards when performance is below standard

Guidelines

- Ensure that employees fully understand all of the components of the compensation program, including the fact that merit increases and bonuses are merit, not guaranteed.
- Consistently reward high performance.
- Use the compensation option that is most appropriate for the situation.
- Communicate all employees fairly and equitably.

Resources

- Compensation Philosophy Manual
- Salary Administration Survey Document

3.5. Legal considerations

All decisions regarding employee compensation, including salary increases, bonuses and other rewards, must be made in a non-discriminatory manner. All compensation information must be treated as highly confidential.

3.6. Legal considerations

I have read this page and understand the contents.

Acknowledges

FIGURE 3

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Rewards Authoring Publishing Administration Reporting

My Site Site Settings Help
Powered by AUTHORIA

Shelley Moore - Product Manager

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Awarding a bonus - Actions

Highlights Actions Tips

TABLE OF CONTENTS

- Milestones
- Tasks
- Preparation

Milestones

In the table below, you will find a listing of critical milestones to meet as you award a bonus:

Milestones	Key dates
Human Resources conducts a bonus kick-off meeting.	November 3 and June 4
Distribute Self-assessment Form to all employees.	November 15 and June 15
Collect Self-assessment Forms.	November 20 and June 20
Complete a Goals Results Form for each employee.	November 20 - 25 and June 20 - 25
Submit initial bonus award recommendations to your department head and Human Resources for approval.	November 27 and June 28
Schedule a meeting with each employee to review performance and obtain a signed Goals Results Form.	December 1 and July 1
Communicate approved bonus awards to each employee.	December 15 and July 15
Bonuses are payable.	December 20 and July 20

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Tasks

When you award employees a bonus, you must:

- distribute to and collect from each employee a Self-assessment Form
- review employee performance as measured against goals
- complete a Goal Results Form for each employee
- submit initial recommendations to your department head and Human Resources to obtain approval for any proposed bonus awards
- schedule a meeting with each employee to review results
- provide Human Resources with the final Goal Results Form, signed by you and the employee
- communicate the approved bonus award to each employee

Determining the appropriate bonus amount

To determine the appropriate bonus amount for each employee, you should:

- measure the employee's progress against goals
- provide a percentage for "goal accomplished"
- calculate the total individual objective as a percentage
- compare the total individual objective percentage against the employee's bonus opportunity

Providing above average bonuses to top performers

If you feel that certain employees performed significantly better than others and deserve additional rewards, consider increasing their bonus award. To do this, you must:

- be sure the total bonus percentage is still within budget for your department
- obtain approval from your department head if the bonus is beyond the established range for an employee
- be prepared to document how the employee's performance and current responsibilities warrant the additional award

Providing no bonuses to poor performers

If you feel that certain employees did not perform up to standard, you may choose not to award them a bonus. Remember, bonuses are not guaranteed and are a reflection of an employee's performance. The decision not to award a bonus can be an appropriate and effective motivational tool.

If you do not award a bonus to an employee, be sure to:

- document the reasons why this employee should not receive a bonus (e.g., the employee is rated 2.5 or below)
- clearly explain what the employee needs to do going forward to improve performance
- enter zero dollars as a recommended bonus amount

To make bonus recommendations, use the Compensation management system.

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Preparation

To assist you in preparing for awarding a bonus, you may want to review:

- total compensation for each employee
- job grades and bonus opportunities
- annual budget

FIGURE A

[Back to top](#)

All calculations and figures in this document are for illustrative purposes only. Actual compensation decisions are based on individual employee performance and other factors. This document is not intended to be a substitute for legal advice. Please consult your attorney.

Universal Dynamics

Manager Advisor Home Plan Manage Deploy Evaluate Reward Your direct reports Help
Customer 02 - Director, Customer Operations

Your direct reports

**Manager Advisor Home Plan Manage Deploy Evaluate Reward Your direct reports Help
Customer 02 - Director, Customer Operations**

Job Details

Employee ID	Name	Job Title	Performance Rating	Last Increased Date	Phones
EXTcust04	Customer 04	Team Lead, CCE	Unsatisfactory	1/1/2004	
EXTcust05	Customer 05	Team Lead, CCE	Exceeds Expectations	1/1/2004	

Vacation/Sick Time

Employee ID	Name	Personal Time	Vacation Time	Sick Time
EXTcust04	Customer 04	11	17	19
EXTcust05	Customer 05	20	22	34

Training Summary

Employee ID	Name	Training Course	Grade
EXTcust04	Customer 04	Conflict resolution for customer service	Passed
EXTcust05	Customer 05	Conflict resolution for customer service	Passed

FIGURE 5

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting AUTHORIA

Authoring

Current Location Manager Advisor

Authoring Authoring Help

Actions

- Create Subarea
- Change Settings
- Manage Security
- Manage Content
- Manage Portal Site
- Add to My Links
- Alert Me
- Edit Page

Maintain event content

- Aligning with corporate goals
- Assessing your current organization
- Awarding a bonus
- Creating a career development plan
- Creating a performance improvement plan
- Conducting a performance review
- Creating a staffing plan
- Creating a succession plan
- Developing a salary plan
- Driving performance improvement
- Giving a salary increase
- Granting stock options
- Hiring an employee
- Identifying your optimum organization
- Managing a change in employee status
- Managing a complaint
- Managing a leave of absence
- Managing a reduction in force
- Managing a resignation
- Managing attendance
- Managing ongoing performance
- Managing the feedback process
- Onboarding an employee
- Promoting an employee
- Recruiting an employee
- Setting goals and objectives
- Staffing a position
- Terminating an employee
- Understanding the compensation program

Maintain configuration

Type Name

- Contact roles
- Employee groups
- Event types
- Links
- Substitution variables
- System variables

Maintain home page content

Type Name

- Home page content

Maintain index pages content

Type Name

- Index pages content

Maintain employee summary page/dashlet

Last Name First Name Business Phone E-mail Address

There are no items to show in this view of the "Contacts" list. To create a new item, click "Add new item" below.

Add new item

Maintain pictures

Maintain resources

52 50 58 66 54 60 62

FIGURE 6

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting Authoria

Publishing

This topic

1. Choose what you want to publish

Publish All
 Publish Specific Items

Publish event content

Choose an event type: ALL

Available events	Selected events
Managing a reduction in force	Managing a resignation
Promoting an employee	Giving a salary increase
Driving performance improvement	Terminating an employee
Creating a staffing plan	Granting stock options
Creating a performance improvement plan	Conducting a performance review
Managing the feedback process	Managing a change in employee status
Onboarding an employee	Developing a salary plan
Hiring an employee	

Publish page views

Choose an event type: Understanding the compensation program

Publish other components

Publish configuration
Publish contacts
Publish employee summary page
Publish index pages
Publish manager home page
Publish pictures
Publish resources

2. Choose where you want to publish

Authoring Preview
(Server = http://evn-2k3-zb791; Area = 1)

Authoring Production
(Server = Value-123-2001-test; Area = 1)

Push 68

3. Get Publishing Status

Get status 1 70

FIGURE 7

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting AUTHORIA

Administration

Current Location: Manager Advisor Administration

Actions:

- Add Listing
- Add Person
- Create Subarea
- Upload Document
- Change Settings
- Manage Security
- Manage Content
- Manage Portal Site
- Add to My Links
- Alert Me
- Edit Page

SharePoint administration links

- Manage users
- Manage site groups
- Change portal site properties
- Manage portal site structure
- Configure search and indexing
- Configure usage analysis processing
- Add new link

Authoria Manager/Advisor administration links

- Implementation configuration
- Application settings
- Trace settings and log
- Employee summary schema generator
- Compliance tracking reset
- Cache refresh
- Authoria customer connection

FIGURE 8

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting AUTHORIA

Compliance report

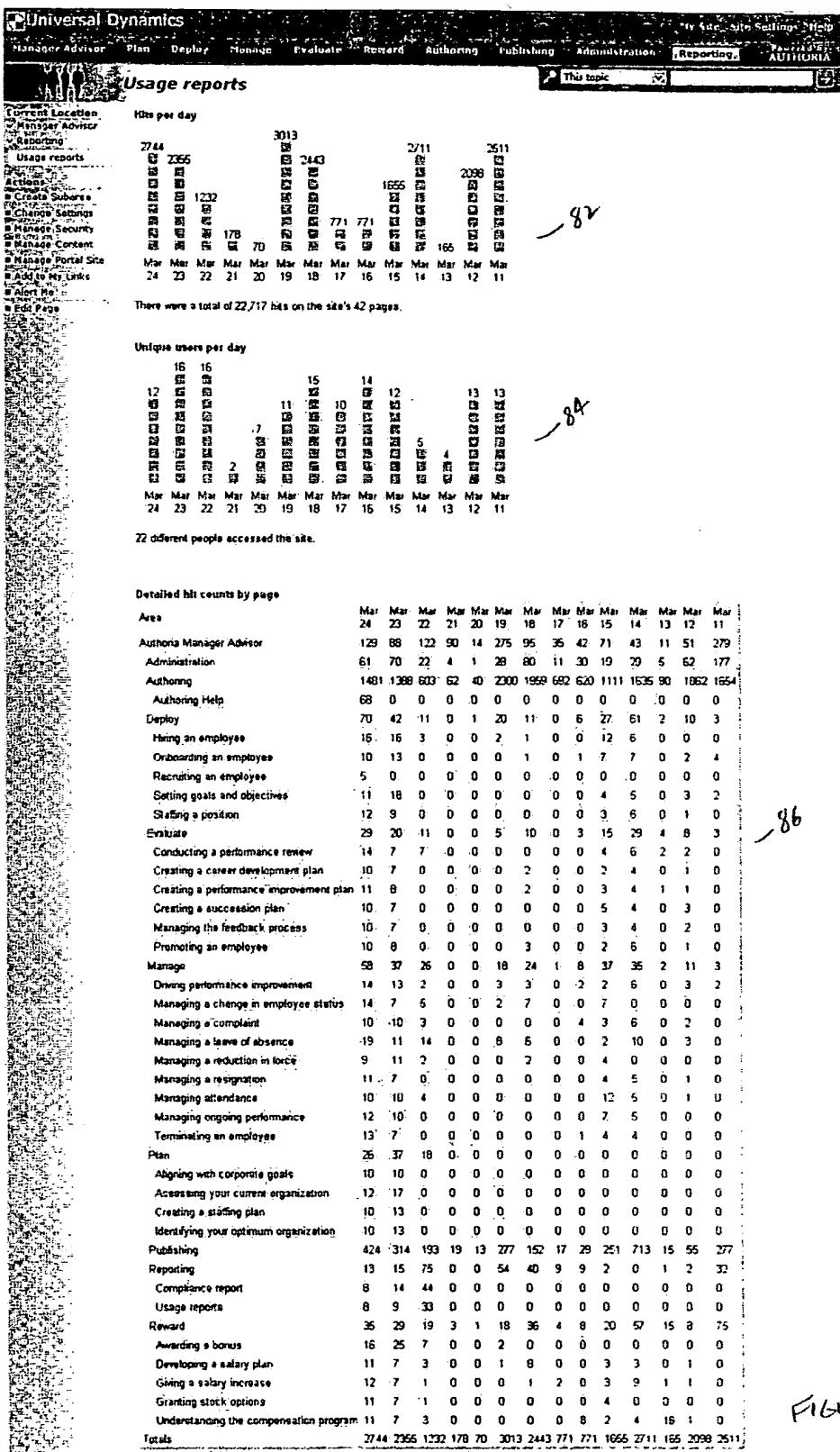
This report lists the events for which compliance is required and specifies which managers have acknowledged reading the event content.

Event Name	Viewer Name	Viewer ID	Time Acknowledged	Total
Creating a staffing plan	Ken Hecht	781530208	3/23/2004 2:38:49 PM	1
Managing a leave of absence	Ryan Smith	781530207	3/23/2004 2:38:08 PM	1

Actions:

- Create Subarea
- Change Settings
- Manage Security
- Manage Content
- Manage Portal Site
- Add to My Links
- Alert Me
- Edit Page

FIGURE 9



You can copy the above table into Excel for further analysis and archiving. Other notes:

- Usage data specifically for system storage and network capacity planning can be found on the site collection usage summary page.

FIGURE 10

Substitution variables

Substitution variables overview

A substitution variable can be used to substitute a value for another value in content that appears on pages. When configuring content, you can use brackets to delineate a variable whose value should be determined using this form. For example, if {employee} is used in content, the system will look for a variable ID named "employee" (case sensitive), and substitute the term in the "Value" column.

Variable ID	Description	Value
Company	Substitution variable for the word Company	Company
Companies	Substitution variable for the word Companies	Companies
Company's	Substitution variable for the word Company's	Company's
company	Substitution variable for the word company	company
companies	Substitution variable for the word companies	companies
company's	Substitution variable for the word company's	company's
Company name	Substitution variable for the word Universal Dynamics	Universal dynamics
Company name's	Substitution variable for the word Universal Dynamics'	Universal dynamics'
a company	Substitution variable for the phrase a company	a company
Department	Substitution variable for the word Department	Department
Departments	Substitution variable for the word Departments	Departments
Departments'	Substitution variable for the word Department's	Departments'
Department's	Substitution variable for the word Department's	Department's
Departmental	Substitution variable for the word Departmental	Departmental
department	Substitution variable for the word department	department
departments	Substitution variable for the word departments	departments
department's	Substitution variable for the word department's	department's
departments'	Substitution variable for the word departments'	departments'
departmental	Substitution variable for the word departmental	departmental
a departmental	Substitution variable for the phrase a departmental	a departmental
Employee	Substitution variable for the word Employee	Employee
Employees	Substitution variable for the word Employees	Employees
Employee's	Substitution variable for the word Employee's	Employee's
employee	Substitution variable for the word employee	employee
employees	Substitution variable for the word employees	employees
employee's	Substitution variable for the word employee's	employee's
employees'	Substitution variable for the word employees'	employees'
An employee	Substitution variable for the phrase An employee	An employee
an employee	Substitution variable for the phrase an employee	an employee
an employee's	Substitution variable for the phrase an employee's	an employee's
Career management system	Substitution variable for the phrase Career management system	Career management system
Compensation management system	Substitution variable for the phrase Compensation management system	Compensation management system
Human Resources management system	Substitution variable for the phrase Human Resources management system	Human Resources management system
Performance management system	Substitution variable for the phrase Performance management system	Performance management system
Staffing management system	Substitution variable for the phrase Staffing management system	Staffing management system
Time and absence management system	Substitution variable for the phrase Time and absence management system	Time and absence management system
Highlights	Substitution variable for the text of the Highlights tab	Highlights
Actions	Substitution variable for the text of the Actions tab	Actions
Tips	Substitution variable for the text of the Tips tab	Tips
Company philosophy	Substitution variable for the text of the Company philosophy section header	Company philosophy
Policy snapshot	Substitution variable for the text of the Policy snapshot section header	Policy snapshot
Manager's role	Substitution variable for the text of the Manager's role section header	Manager's role
Legal considerations	Substitution variable for the text of the Legal considerations section header	Legal considerations
Preparation	Substitution variable for the text of the Preparation section header	Preparation
Milestones	Substitution variable for the text of the Milestones section header	Milestones
Tools	Substitution variable for the text of the Tools section header	Tools
Tasks	Substitution variable for the text of the Tasks section header	Tasks

FIGURE 11

